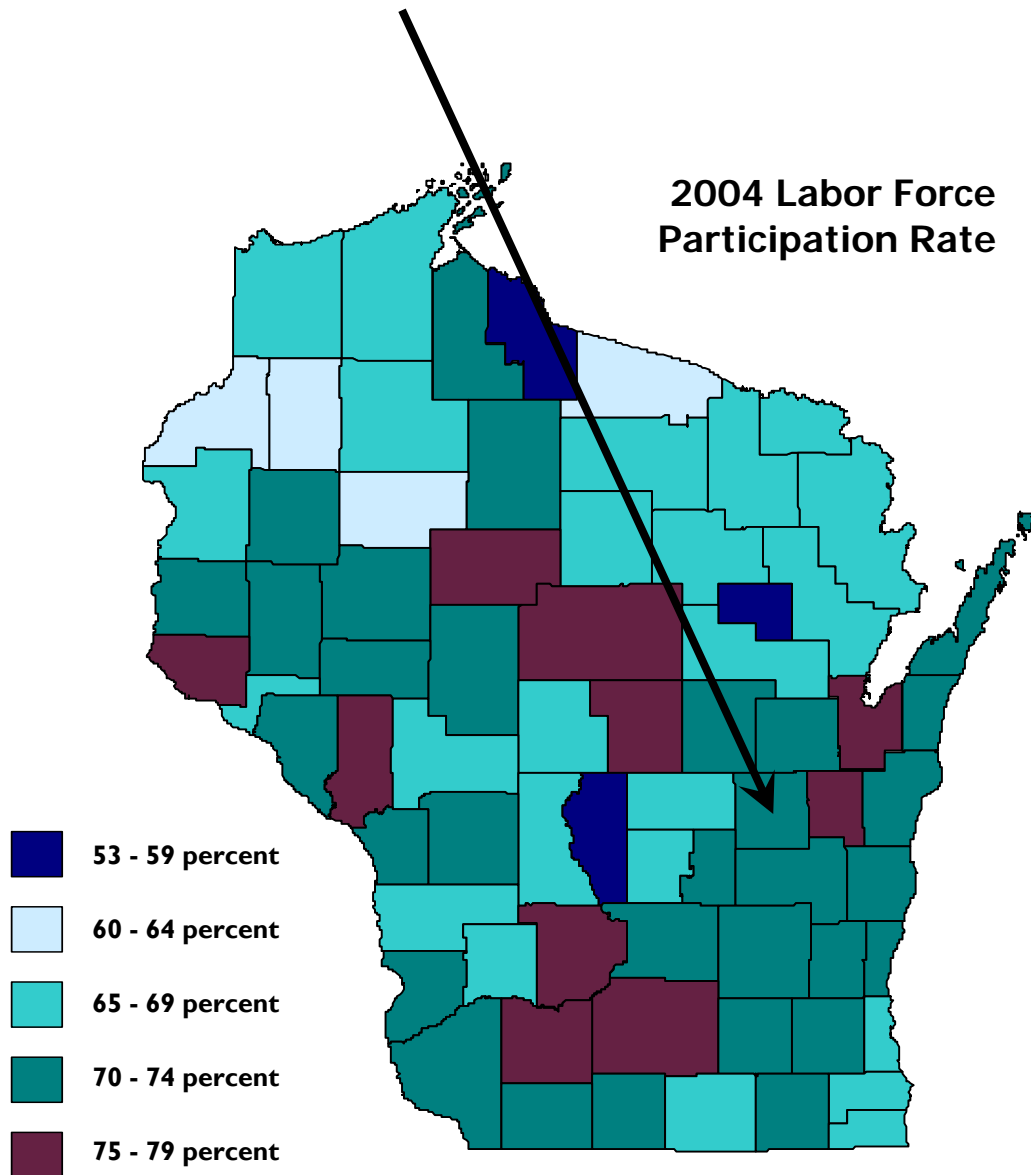


# Winnebago County Workforce Profile



Source: Estimates created by DWD, OEA using data supplied by  
U.S. Bureau of Labor Statistics and U.S. Bureau of Census

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## County Population and Labor Force

The population in Winnebago County grew at a slightly faster pace than in the State of Wisconsin, but lagged behind the United States. Between 2000 and 2005 the county added 9,589 residents to its population base. Although the growth rate for the county exceeded the state's rate during the first five years of this decade, the overall projected growth rate for the county from 2000 to 2020 is expected to be less than the state's growth rate. During that time, the county is expected to grow by 12.7 percent, compared to 13.9 percent for the state and 19.3 percent for the nation.

The percent of the population aged 16 years and over that is currently in the labor force is 73.1 percent. This is well above the statewide average of 70.8 percent. This average fluctuates on a monthly and annual basis depending on where we are in the economic cycle during the year as well as how the overall economy is doing. Generally, the participation rate in Wisconsin and Winnebago County are well above the national average which is currently 65.4 percent. Wisconsin's labor force participation rate is usually in the top five nationally. A disadvantage of a high participation rate is that it indicates that the number of residents who want to work has reached a maximum. If that occurs, then how do you create more jobs without a pool of available workers?

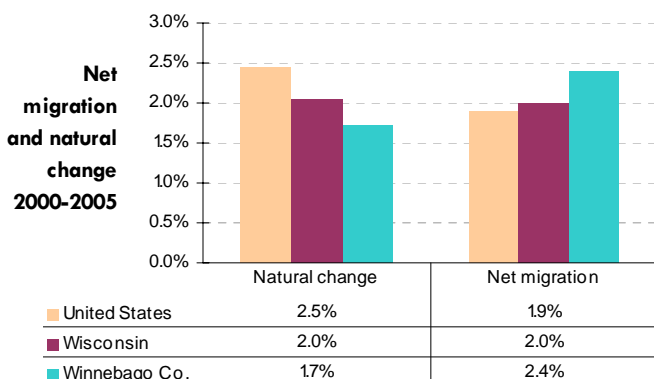
The make-up of the county's population by age group is also different than the state and nation. The percentage of the youngest group (those 16 to 24 years old) is above the state

### Five largest municipalities in Winnebago County

	April 2000 Census	Jan. 1, 2005 estimate	Numeric change	Percent change
<b>Winnebago County</b>	156,763	163,244	6,481	4.1%
Oshkosh, City	62,916	65,445	2,529	4.0%
Neenah, City	24,507	25,338	831	3.4%
Menasha, Town	15,858	16,924	1,066	6.7%
Menasha, City*	15,643	15,803	160	1.0%
Algoma, Town	5,702	6,186	484	8.5%

\*Winnebago County portion only

Source: Wis. Dept. of Administration, Demographic Services, August 2005

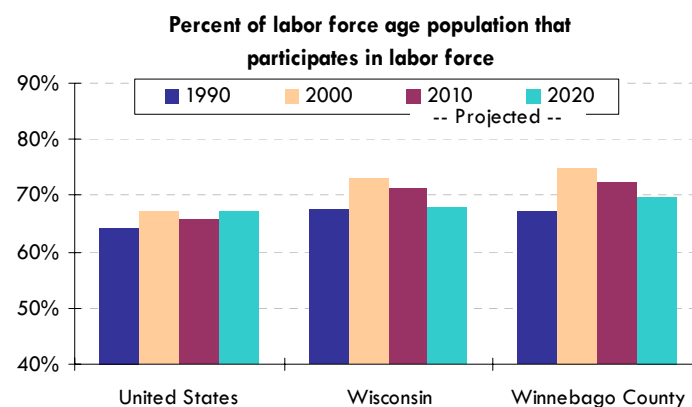


Source: WI Dept. of Admin., Demographic Services & US Census Bureau

### Population and Labor Force

	United States	Wisconsin	Winnebago County
<b>Total population in 2000</b>	281,424,602	5,363,715	156,763
<b>Population est. Jan. 1, 2005</b>	295,160,302	5,580,757	163,244
Change	13,735,700	217,042	6,481
% change	4.9%	4.0%	4.1%
<b>2005 Labor force population*</b>	224,837,000	4,339,938	126,911
Share of total population	76.2%	78%	77.7%
Labor force	147,125,000	3,071,179	92,788
Labor force participation rate	65.4%	70.8%	73.1%
<b>2005 Population 16 yrs. &amp; over</b>	228,621,674	4,417,313	131,219
16-24 yrs old	37,489,370	743,764	22,488
Share of population 16+ yrs	16.4%	16.8%	17.1%
25-59 yrs old	142,248,896	2,708,865	81,502
Share of population 16+ yrs	62.2%	61.3%	62.1%
60 yrs and older	48,883,408	964,684	27,229
Share of population 16+ yrs	21.4%	21.8%	20.8%
<b>Projected population: 2020</b>	335,804,546	6,110,878	176,614
<b>Population 16 yrs. &amp; over</b>	264,085,104	4,869,573	140,944
16-24 yrs old	37,918,865	681,586	22,854
Share of population 16+ yrs	14.4%	14.0%	16.2%
25-59 yrs old	150,678,402	2,756,884	79,458
Share of population 16+ yrs	57.1%	56.6%	56.4%
60 yrs and older	75,487,837	1,431,103	38,632
Share of population 16+ yrs	28.6%	29.4%	27.4%

\* civilian population 16 yrs. and older not in an institution



Source: special tabulation by OEA using US Census, US Bureau of Labor Statistics, WI Dept. of Admin. estimates and projections

and nation, while the group over 60 years is below the statewide and national average. This should have an impact on economic development in the county as the area will continue to have a greater share of young workers entering the labor force to replace retirees than the state and nation. However, the area will have a lower percentage of middle aged workers than the state and nation in 2020.

## Revised Labor Force

The county's labor force had its largest increase of workers between 1991 and 1992 when it increased by just over 3,000 workers. This was the period right after the recession of 1991 while the economy was beginning to grow rapidly. The county's unemployment rate was also on a decline at the time reaching 2.3 percent in 1999, just prior to the most recent recessionary period. Since that time, the county's labor force has decreased and is now in the process of recovering. Currently the labor force for the county is at 92,788. Part of the large drop in the labor force between 1999 and 2000 was a change in estimating brought on by the 2000 census and the formula used to remove Winnebago County from the Appleton/Oshkosh MSA and make it a separate MSA.

While the recession began and ended in 2001, the unemployment rate in the county did not peak until 2003 when it reached 5.3 percent. Since that time, the number of unemployed as well as the rate have dropped. Although the rate has moderated during the last year, the number of workers estimated to be unemployed remain above the long term average of 3,204 for the period.

## Winnebago County Civilian Labor Force Estimates

	Labor force	Employed	Unemployed	Unemployed rate
1990	83,878	81,020	2,858	3.4%
1991	85,646	82,535	3,111	3.6%
1992	88,678	85,670	3,008	3.4%
1993	91,657	88,289	3,368	3.7%
1994	94,062	90,712	3,350	3.6%
1995	95,136	92,331	2,805	2.9%
1996	96,576	93,902	2,674	2.8%
1997	97,272	94,553	2,719	2.8%
1998	96,906	94,361	2,545	2.6%
1999	96,321	94,150	2,171	2.3%
2000	89,875	87,427	2,448	2.7%
2001	91,915	88,504	3,411	3.7%
2002	92,644	88,129	4,515	4.9%
2003	92,522	87,653	4,869	5.3%
2004	92,788	88,585	4,203	4.5%

Source: DWD, Bureau of Workforce Information, Local Area Unemployment Statistics, September 2005

## Education Attainment

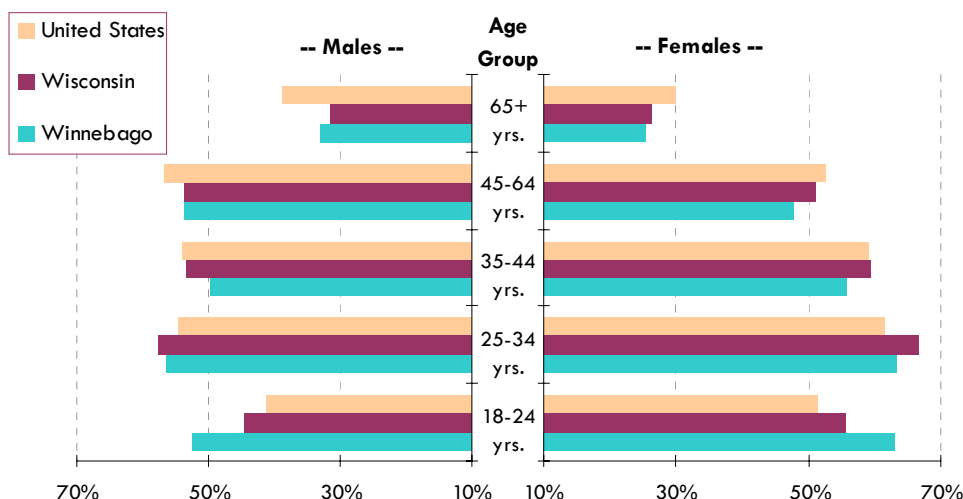
The focus of this county's analysis to this point has been on quantitative changes in Winnebago County's population and labor force. At this point we will move to information on the quality of the county's labor force in comparison with the state and nation by age and gender.

Among the ways which experts measure the overall quality of a region's skilled workforce is through an analysis of the

level of education attainment among the population. An example of this type of analysis is depicted in the graph below. In reviewing this data, a number of significant trends are apparent.

The county surpasses the state and national averages in only the youngest age group for both male and female levels of post-secondary education (measured as attendance at either a technical or community college and/or four-year college or university). It surpasses the nation in the 25 to 34 year group for both sexes and the state in the over 65 year group for males. Females in the county only exceed the nation and state in the 18 to 24 year old category with post secondary education and the state only in the 25 to 34 year category. Although the percentage of females with post-secondary education generally lags the state and national average, it does exceed the percentage of males in the county with post secondary education in the youngest three categories. The percent of females with post secondary education exceeds that of males in the youngest three age groups in the state and nation.

### Residents with post-secondary education



Source: US Census 2000, Summary file 3, QT-P20

## Employment and Wages

Average wages in Winnebago County were nearly ten percent above the state-wide average in 2004. The county's highest paid industry is professional and business services which is at 136.8 percent of the state's average. Manufacturing is the next highest paying industry with wages at 112.3 percent of the statewide average. Although manufacturing has a lower annual average wage than professional and business services, the overall impact on the county is quite different due to the much larger number of workers in manufacturing.

Total payroll from manufacturing exceeds 1.1 billion dollars, over twice that of professional and business services. Manufacturing provides a disproportionate share of wages compared to jobs in the county. While manufacturing provides 27 percent of the county's jobs, over 35 percent of all wages paid in the county come from this industry. Other industries that provide a greater share of the county's wages compared to jobs include: professional and business services, and construction.

Education and health had the second highest number of workers, as well as the second greatest portion of the county's total payroll of any industry. This is not to diminish the importance of the other industries in the county. It is important that an area have a wide diversity of industry to balance its needs as well as to provide buffers to the ups and downs in the national economy

### Average Annual Wage by Industry Division in 2004

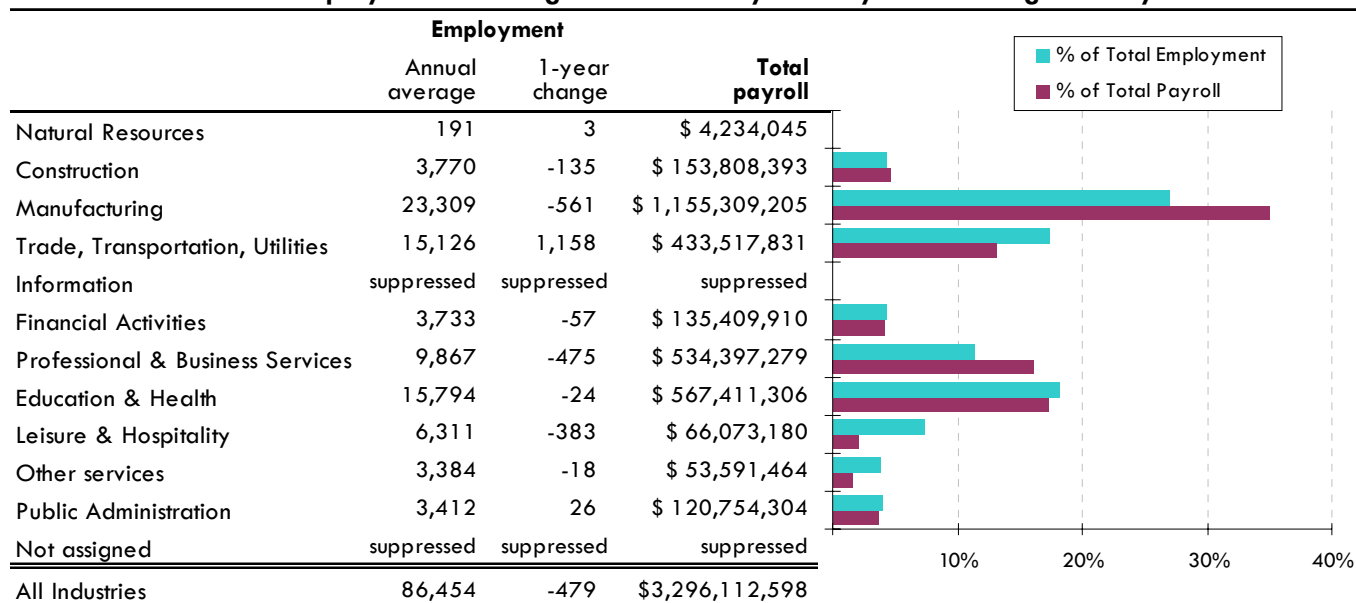
	2004	2004		
	Average Annual Wage	Percent of	1-year	
	Wisconsin	Winnebago County	Wisconsin	% change
All Industries	\$ 34,749	\$ 38,126	109.7%	5.2%
Natural resources	\$ 27,399	\$ 22,168	80.9%	2.4%
Construction	\$ 41,258	\$ 40,798	98.9%	2.3%
Manufacturing	\$ 44,145	\$ 49,565	112.3%	6.6%
Trade, Transportation, Utilities	\$ 30,088	\$ 28,660	95.3%	0.5%
Information	\$ 41,759	suppressed	Not avail	Not avail.
Financial activities	\$ 45,103	\$ 36,274	80.4%	7.9%
Professional & Business Services	\$ 39,580	\$ 54,160	136.8%	12.6%
Education & Health	\$ 36,408	\$ 35,926	98.7%	2.8%
Leisure & Hospitality	\$ 12,295	\$ 10,470	85.2%	3.7%
Other services	\$ 20,207	\$ 15,837	78.4%	3.3%
Public Administration	\$ 36,347	\$ 35,391	97.4%	0.7%

Source: WI DWD, Bureau of Workforce Information, Quarterly Census of Employment & Wages

during the annual economic cycles each industry experiences.

The trade and transportation and utilities industry added the most jobs over the last year with over 1,100 jobs. However, even though average pay is high in the industry, this is often not true in one of its components, retail trade. This is not reflected in the table since it is included with other industries that are less seasonal and have higher average wages. Average wages in the leisure and hospitality industry are generally at the lower end of the scale when compared with other industries in Winnebago County as well as in Wisconsin due to the seasonality of the businesses. Many of the jobs are part time and only part of the year.

### 2004 employment and wage distribution by industry in Winnebago County



Source: WI DWD, Bureau of Workforce Information, Quarterly Census Employment and Wages, June 2005

## Industry and Employers by Size

### Top 10 Employers in Winnebago County

Establishment	Product or Service	Size (Dec. 2004)
Kimberly Clark Global Sales Inc	Gen. warehousing & storage	1000+ employees
Oshkosh Truck Corp	Heavy duty truck mfg.	1000+ employees
TheDACare Inc	Offices of physicians, except mental health	1000+ employees
Oshkosh Public School	Elementary & secondary schools	1000+ employees
University of Wisconsin- Oshkosh	Colleges & universities	1000+ employees
Pierce Mfg Inc	Motor vehicle body mfg.	1000+ employees
Plexus Services Corp	Printed circuit assembly mfg.	1000+ employees
Kimberly-Clark Corp	Nonwoven fabric mills	1000+ employees
Curwood Inc	Plastics packaging film & sheet mfg.	1000+ employees
Department of Health & Family	Residential mental & substance abuse care	1000+ employees

Source: DWD, Bureau of Workforce Information, ES-202, July 2005

### Prominent industries in Winnebago County

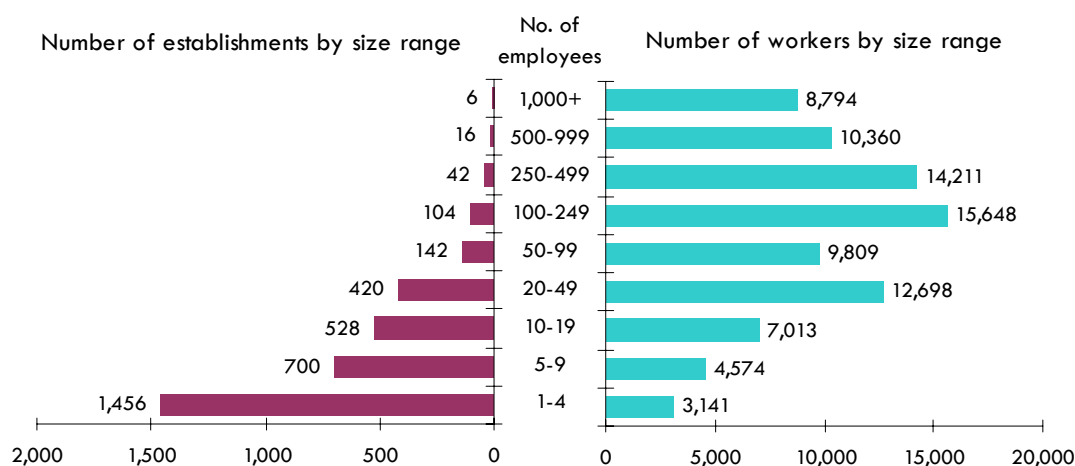
NAICS title	March 2005		Numeric change in employees	
	Establishments	Employees	2004-2005	2000-2005
Paper manufacturing	39	6,464	-223	-5,210
Educational services	20	5,593	111	533
Food services and drinking places	257	4,904	227	6
Transportation equipment manufacturing	12	4,088	357	405
Management of companies and enterprises	29	3,450	-130	2,316
Administrative and support services	107	3,252	144	-414
Ambulatory health care services	190	3,113	75	-445
Professional and technical services	205	2,977	-16	717
Hospitals	3	2,924	-153	-340
Nursing and residential care facilities	43	2,874	98	199

\* data suppressed to maintain employer confidentiality

Column headings revised 02/06

Source: DWD, Bureau of Workforce Information, ES-202, September 2005

### Winnebago County establishments and workers by employment size range in 2004



(1) Data not available due to suppression factors

Source: DWD, Bureau of Workforce Information, Table 221, July 2005

Although Winnebago County has a great deal of diversity in its industry, a high percentage of businesses are related to manufacturing. The county has 27 percent of its jobs in manufacturing, compared to 18 percent in the state and 11 percent in the nation. This is reflected in the county's ten largest employers. Five of the largest employers are related to manufacturing including Kimberly-Clark one of the paper manufacturers in the county. This is the largest industry sector of the top ten. Also, two of the county's largest industry groups, paper manufacturing and transportation equipment manufacturing, are in the manufacturing sector.

It is not unusual that school districts are in the ten largest employers group. These employers are limited in number and provide services to large sectors of the population and therefore tend to have a concentrated number of workers. This coincides with the second largest industry group, educational services, which includes both the public and private educational facilities.

The graph on the bottom of this page indicates that over 90 percent of the county's employers have fewer than 50 employees and provide just under 32 percent of the jobs. At the same time, over 56 percent of the jobs are with employers that have at least 100 workers.

## Per Capita Personal Income

One other aspect of looking at the economy of a county is the per capita personal income (PCPI) in the county. Because the income is derived from all sources, it tells more than just what wages or types of jobs are available. The latest PCPI available is for the year 2003. PCPI in Winnebago County was \$30,359. The county's PCPI ranks 15th highest among the state's 72 counties and is \$326 below the statewide PCPI, and \$1,113 below the nation.

PCPI is defined as total personal income divided by the total population. The majority of total personal income, though not exclusive to this list, is made up of wage and salary earnings, dividends from holdings, accrued interest, rental property income, retirement benefits, social security and other government transfer payments.

The ranking of Winnebago County is influenced in large part by having an average wage that is well above the statewide average. The fact that the county is part of a metropolitan area where wages are generally higher also has an impact, although per capita income is influenced as well by sources other than wages.

Net earnings make up 70.2 percent of the county's total income. This compares very closely to the state average of 69.9 percent. The remainder of PCPI comes from dividends, interest and rental property income and transfer payments.

Net earnings weigh a bit heavier in the equation compared to the state due to the higher wages in the area as well as a higher percentage of the county's population being in the labor force.

The age of the population affects the percent of PCPI that comes from transfer payments, part of which is payments under Social Security. In Winnebago county, only 12.7 percent of total personal income is

from this source, just under the state average of 14.0 percent. This is comparable to the smaller percentage of the county's population over age 60 when compared with Wisconsin. The remaining 17.2 percent comes from dividends, holdings, accrued interest, rental property income. This is higher than the state average of 16.2 percent.

**Wisconsin Counties 2003 Per Capita Personal Income and Rank in State**

Area	2003	Rank	5-yr growth	Rank	Area	2003	Rank	5-yr growth	Rank
United States	\$ 31,472		17.1%		Manitowoc	\$ 27,807	27	13.6%	59
Wisconsin	\$ 30,685		17.2%		Marathon	\$ 29,992	16	22.0%	5
Adams	\$ 22,804	59	16.1%	37	Marinette	\$ 25,448	39	21.3%	9
Ashland	\$ 23,204	55	16.6%	32	Marquette	\$ 22,590	64	26.5%	1
Barron	\$ 24,922	41	15.2%	44	Menominee	\$ 18,449	72	19.8%	16
Bayfield	\$ 22,660	62	13.4%	60	Milwaukee	\$ 31,419	7	19.5%	18
Brown	\$ 32,076	5	17.8%	25	Monroe	\$ 23,467	54	16.8%	31
Buffalo	\$ 29,083	20	17.2%	28	Oconto	\$ 24,842	42	12.3%	66
Burnett	\$ 22,796	60	17.1%	29	Oneida	\$ 28,646	22	18.7%	21
Calumet	\$ 31,880	6	21.4%	8	Outagamie	\$ 30,952	11	20.5%	14
Chippewa	\$ 25,999	36	12.3%	67	Ozaukee	\$ 47,527	1	14.7%	48
Clark	\$ 22,227	66	13.9%	55	Pepin	\$ 24,407	44	13.0%	64
Columbia	\$ 30,846	12	18.2%	24	Pierce	\$ 27,963	26	18.6%	23
Crawford	\$ 22,628	63	20.9%	13	Polk	\$ 24,201	46	13.9%	54
Dane	\$ 36,455	3	21.0%	12	Portage	\$ 27,464	30	21.1%	11
Dodge	\$ 26,048	35	13.3%	61	Price	\$ 24,361	45	12.2%	68
Door	\$ 30,657	13	15.9%	40	Racine	\$ 31,271	8	15.0%	45
Douglas	\$ 23,568	53	15.3%	43	Richland	\$ 23,829	51	21.9%	6
Dunn	\$ 22,885	58	14.9%	47	Rock	\$ 28,256	25	14.1%	50
Eau Claire	\$ 27,469	29	17.5%	27	Rusk	\$ 20,461	71	14.0%	52
Florence	\$ 24,146	47	25.3%	3	Sauk	\$ 28,780	21	19.5%	19
Fond du Lac	\$ 29,951	17	16.1%	38	Sawyer	\$ 23,921	50	22.3%	4
Forest	\$ 21,975	68	25.4%	2	Shawano	\$ 23,941	49	13.9%	56
Grant	\$ 24,116	48	15.6%	42	Sheboygan	\$ 31,251	9	19.8%	17
Green	\$ 28,542	23	14.0%	51	St. Croix	\$ 31,091	10	13.6%	57
Green Lake	\$ 26,962	32	8.1%	72	Taylor	\$ 23,020	56	16.6%	34
Iowa	\$ 27,308	31	19.2%	20	Trempealeau	\$ 25,242	40	18.7%	22
Iron	\$ 22,912	57	21.1%	10	Vernon	\$ 20,950	70	15.7%	41
Jackson	\$ 26,084	34	21.9%	7	Vilas	\$ 25,664	37	13.0%	63
Jefferson	\$ 29,330	18	16.5%	35	Walworth	\$ 27,626	28	13.6%	58
Juneau	\$ 22,382	65	12.7%	65	Washburn	\$ 22,794	61	16.0%	39
Kenosha	\$ 29,117	19	16.5%	36	Washington	\$ 35,196	4	14.9%	46
Kewaunee	\$ 25,536	38	8.8%	71	Waukesha	\$ 41,551	2	12.2%	69
La Crosse	\$ 28,284	24	16.8%	30	Waupaca	\$ 26,863	33	14.0%	53
Lafayette	\$ 21,983	67	10.1%	70	Waushara	\$ 21,762	69	13.2%	62
Langlade	\$ 23,739	52	20.4%	15	Winnebago	\$ 30,359	15	16.6%	33
Lincoln	\$ 24,725	43	14.6%	49	Wood	\$ 30,401	14	17.7%	26

Source: U.S. Dept. of Commerce, Bureau of Economic Analysis, Regional Economic Information System, May 2005